

From Misconception to Momentum: 2026 Trends for the UK's Data Centre Sector

The competing pressures shaping the UK's newest CNI and why we all need to support the industry of the future.

Executive Summary

97%

IT decision makers say the UK's technological progress depends on having adequate data centre capacity

Data centres are the backbone of the UK's digital economy, quietly keeping critical digital services running so consumers and businesses can function. They underpin everything from the data we store and access each day, to the security systems that protect it, to the essential public services society depends on, including the NHS. Yet the infrastructure and teams behind these services are largely invisible - until something goes wrong. In those moments, the role of data centres as critical national infrastructure becomes unmistakable.

For many organisations, the focus is on whether the UK can secure the capacity, resilience and power needed to sustain digital growth.

This research paper explores the gap between how data centres are discussed publicly, and how they are experienced by the organisations that rely on them. Using survey insight from UK senior IT decision makers and consumers, it examines the divide between public perception and the real-world pressures IT leaders are managing into 2026 and beyond.

94%

agree that greater public awareness of data centre innovation and sustainability would benefit the industry

As organisations push harder on digital services and AI-heavy workloads, data centre infrastructure is only growing in importance. It reinforces the view from 97% of IT decision makers who say the UK's technological progress depends on having adequate data centre capacity.



Research Highlights

In December 2025 Asanti commissioned Vanson Bourne to survey 100 senior IT decision makers at public and private companies on topics relating to how and where critical workloads are hosted. The survey explored resilience considerations, cyber and downtime risk, data sovereignty and cloud repatriation, the power and rack density demands shaping future infrastructure strategy, as well as the impact of public perceptions on the data centre industry.

The headline findings are that:

92%

of senior IT decision makers cite that public understanding of how data centres enable modern life needs to improve

51%

of IT leaders are prioritising cybersecurity and resilience investment over the next 12 months

85%

of the general public are not fully confident in their understanding of data centres

52%

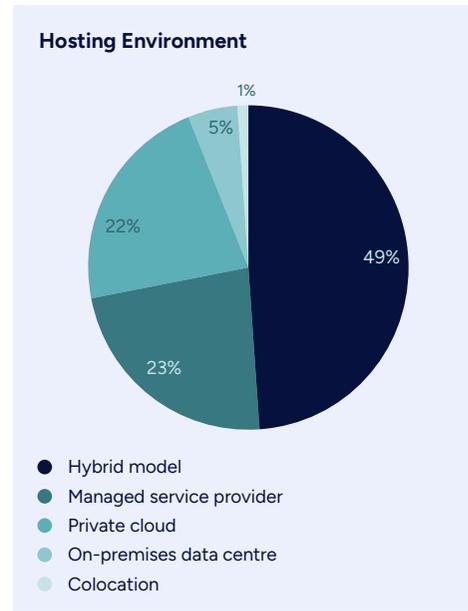
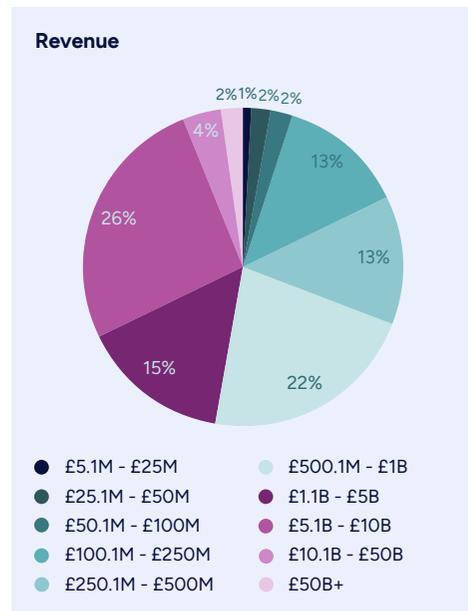
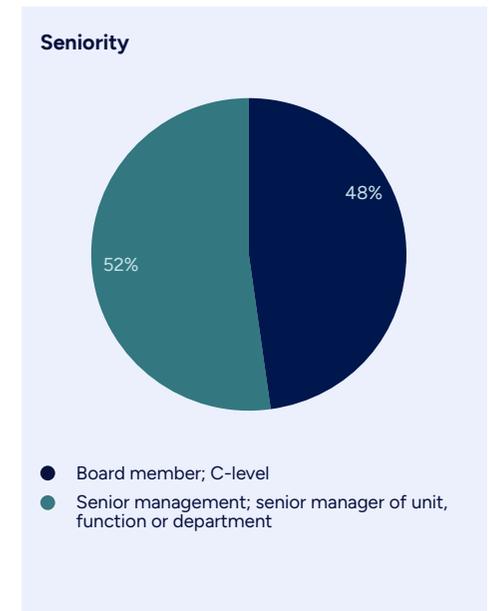
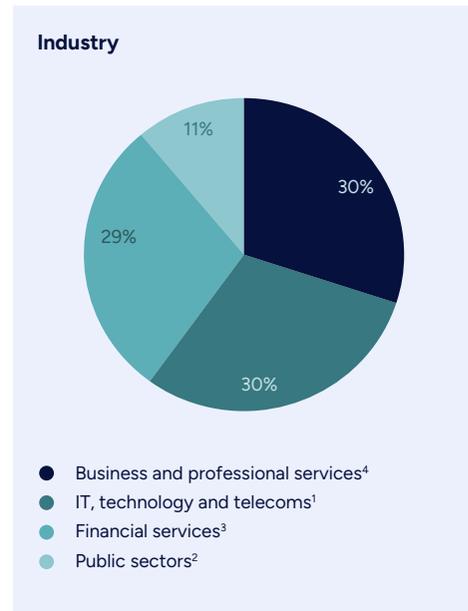
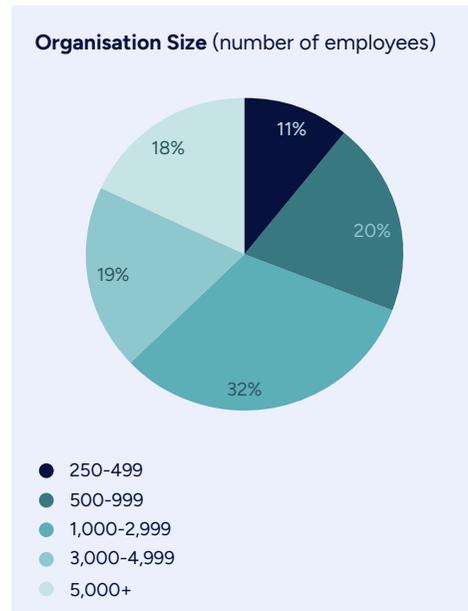
of organisations cite rising power costs as a top concern regarding their current data centre providers



Who Took Part in the Research?

100

Senior IT Decision Makers



¹incl. computer services

²(e.g., armed forces; central/ federal government or NDPB; education – government/ state provided; emergency services; healthcare - government/ state provided; local government)

³incl. banking and insurance

⁴(e.g., business consultancy; legal; accountancy; architecture/design; training; outsourced services; other services specifically or mainly to business)



Public Perception vs Sector Reality

The drive for data centre efficiency and the gap in public understanding

The Narrative in the Public Eye

Data centres underpin almost every digital interaction in the UK, from mobile banking and retail transactions to healthcare systems and public services. Yet public discourse rarely reflects this dependency. **Four in ten consumers (40%) believe that data centres mainly benefit big tech companies rather than ordinary people**, a clear sign that many do not recognise how directly this infrastructure supports their own day-to-day life.

Additionally, **nearly four in ten (37%) consumers believe that they could go about their daily life uninterrupted if data centres stopped working**, yet a further 15% don't know what the impact of that could be. This limited understanding leads consumers to judge data centres through an undeservedly negative lens and is notable in the themes where data centres do feature in mainstream discussion.

Senior IT decision makers report that public discussions often centre on environmental impact, energy consumption and pressure on national infrastructure. But many of these conversations may be shaped by perceptions of overseas markets that operate under very different regulatory and design standards. These markets have different scale, planning conditions and energy contexts, creating a perception gap when applied to UK operating realities.

Senior IT professionals most often encounter the view that data centres drive up consumer energy bills (68%); are major consumers of energy in the UK (62%); and use excessive amounts of water (57%). IT leaders also report hearing that data centres contribute to greenbelt loss, noise and pollution, and even harm air quality and public health.

For consumers, these issues are often framed in the mainstream media in

Chart 1 Conversations Often Heard by Senior IT Decision Makers

Data centres drive up consumer energy bills	68%
Data centres are major consumers of energy in the UK	62%
Data centres use large amounts of water	57%
Data centres lead to the loss of greenbelt land	46%
Data centres create noise and pollution	44%
Data centres harm air quality and public health	38%

ways that heighten concern and feed into wider debates around the cost of living, and local impact. And this is not just noise, **a meaningful minority of consumers say data centres are one of the main reasons household energy bills are so high (29%), believe they are the biggest users of electricity (49%), and think they use large amounts of water (40%) in the UK.**



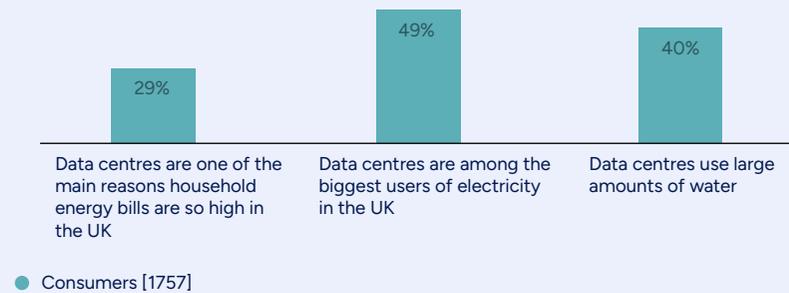
Public Perception vs Sector Reality

The drive for data centre efficiency and the gap in public understanding

"[I would like to see] a better explanation to the general public on what data centres actually do."

Senior Manager, Business and Professional Services,
£50 million-£100 million.

Chart 2 Consumers Who Agree to the Following Statement



These concerns are critical and emotionally charged, but when presented in isolation they crowd out a more fundamental question: what would be at risk without resilient, well-designed data centre infrastructure? Without that context, public debate focuses on perceived costs while overlooking the role data centres play in enabling digital resilience and innovation, and economic productivity across the UK economy.

A Widely Recognised Perception Gap in the Industry

Importantly, consumer perception is not a blind spot within the industry. IT leaders themselves are acutely aware of the disconnect between public perception and operational reality. The issue is not simply that misconceptions exist, but that the sector recognises how powerfully they shape and polarise the wider narrative.

More than eight in ten (83%) senior IT decision makers agree that the role data centres play in supporting everyday digital services is widely misunderstood, and over nine in ten (92%) believe public understanding of how data centres underpin modern life needs to improve. Moreover, 57% of consumers admit to rarely thinking about where their data or online services are hosted, showing there is still much ground to cover before the role data centres play in consumers' digital lives is truly understood.

This gap persists in part because data centres are largely invisible until something goes wrong or is publicised by the media. And because data centre success is measured in uninterrupted service rather than public visibility, debate is easily drawn to isolated local impacts rather than the value data centres deliver to the UK's digital economy.



Public Perception vs Sector Reality

The drive for data centre efficiency and the gap in public understanding

95%

of respondents agree that resilience requirements will play a significantly bigger role in IT strategy in the next 12 months

The Opportunity for a More Balanced Conversation

Senior IT professionals see a clear opportunity to reset the narrative. **Almost all (94%) agree that greater public awareness of data centre innovation and sustainability would benefit the industry.** And because data centres are 'invisible when they work', the burden of explanation shifts to the industry. If the narrative is not actively corrected, the story will be shaped by the most visible critics rather than the actual facts. But with only 25% of consumers supporting the acceleration of investment in digital infrastructure to strengthen UK digital services, including building new facilities, there is considerable progress to be made in building public support.

Yet, powerfully, **97% of IT leaders agree that the UK's technological progress depends on adequate data centre capacity.** So, reframing the debate is not optional. It is foundational to the country's digital future. Without a clearer public understanding of what data centres enable and what is at risk without them, long-term digital resilience and innovation is left exposed to short-term narrative pressure. The balance lies in understanding value, while acknowledging accountability.



Concerns for the Year Ahead

Infrastructure in 2026: Concerns, priorities and opportunities

As organisations continue into 2026, IT leaders face a set of pressures that are tightly interlinked, rather than discrete challenges that can be managed in isolation.

Rising power costs stand out as the top concern, cited by over half (52%) of respondents, and notably, outranking uptime (48%). Once treated as an assumed overhead, energy is now a central factor in operational decision-making, and will

increasingly determine the UK's ability to remain competitive in a digital-first economy.

This is where the pressures facing businesses begin to echo those experienced by households, but with far greater operational implications. For UK organisations, the challenge is not simply the cost of energy, but the ability to secure reliable, uninterrupted power in an increasingly constrained environment. As energy systems

come under strain, power availability has become a core resilience issue for data-driven businesses.

Modern data centres are designed to address this risk through built-in redundancy, including dual power feeds and on-site backup generation, ensuring continuity even during wider grid disruption. As critical national infrastructure (CNI), data centres are also prioritised for fuel access in a crisis, reinforcing their role in maintaining operational stability.

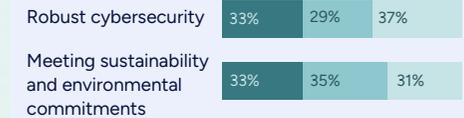
These considerations are shaping hosting strategies. The research shows that 30% of organisations already use data centres outside the UK, with a further 24% planning to do so. While overseas capacity may offer advantages in scalability or power headroom, it can introduce trade-offs around data sovereignty, regulatory compliance and latency for UK-based workloads.

Cybersecurity (33%) continues to feature prominently as a concern, particularly among senior IT managers (37%) who are closest to day-to-day operational risk. Their concern reflects

Chart 4

Concerns About Data Centres Currently Hosting IT Infrastructure

What are your organisation's biggest concerns regarding the data centre(s) where your IT infrastructure is currently hosted? Showing 'Robust cybersecurity' and 'Meeting sustainability and environmental commitments' only. [Base sizes in chart]



- Total [100]
- Board member; C-level [48]
- Senior management [52]

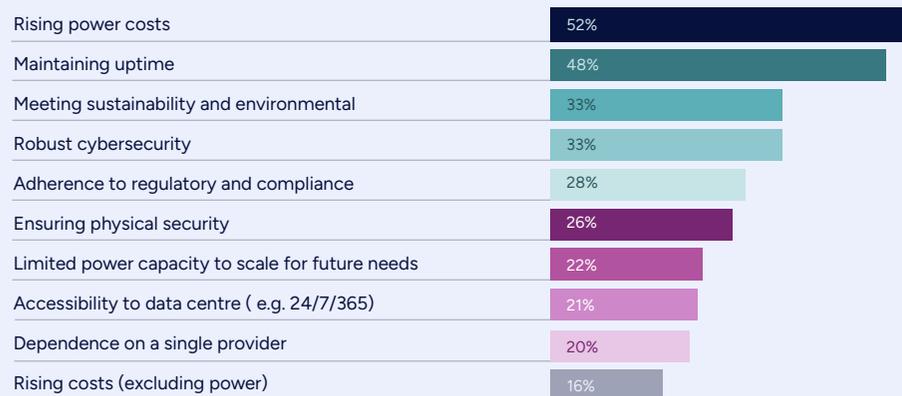
the growing exposure to a heightened threat landscape. At board level, sustainability (board members 35% vs. senior managers 31%) carries greater weight with increased regulatory pressure, public scrutiny and long-term accountability on their shoulders.

These concerns point to an operating environment in which cost, resilience and sustainability are having to be managed simultaneously. Decisions in one area increasingly have direct consequences in the others, leaving little room for single issue optimisation.



Chart 3 Top Concerns About Data Centres Currently Hosting IT Infrastructure

What are your organisation's biggest concerns regarding the data centre(s) where your IT infrastructure is currently hosted? Combination of responses ranked first, second and third [n=100]



Concerns for the Year Ahead

Infrastructure in 2026: Concerns, priorities and opportunities

Strengthening Resilience in Practice

In 2025, cyberattacks and service disruptions brought the consequences of infrastructure failure into sharp focus. High-profile incidents across UK retail and automotive manufacturing have shown that outages are no longer contained IT events. They directly impact organisations and their respective supply chains resulting in lost revenue and halted operations.

In retail, attacks on organisations such as Marks & Spencer, Harrods, and the Co-operative Group led to prolonged service disruption and significant commercial impact. In automotive manufacturing, a cyber incident at Jaguar Land Rover forced production to be suspended across multiple sites for weeks. The losses easily reach into hundreds of millions to billions in

downtime and lost revenue. Yet this is only the immediate financial cost – the long-term recovery cost is still being calculated.

Organisations are setting out their resilience initiatives in response to the cyber events of 2025. In practice, this means **strengthening cybersecurity controls and monitoring (60%), putting greater emphasis on backup strategies (50%) and reviewing business continuity planning (42%)**. The intent is increasingly focused on planning for failure and limiting the impact of incidents, rather than solely attempting to prevent them, reflecting the growing complexity of infrastructure environments and a persistently hostile threat landscape.

The Financial Impact of 2025's Most-Prolific Cases in the UK:

£1.9bn

Jaguar Land Rover total cost to the wider economy¹

£136m

Marks & Spencer's sales and downtime²

£206m

The Co-operative Group sales and downtime³

¹ <https://www.bbc.co.uk/news/articles/cy9pdlld4y81o>

² <https://news.sky.com/story/mands-reveals-cost-of-cyber-attack-as-profit-almost-wiped-out-13464171>

³ <https://www.bbc.co.uk/news/articles/ckgq9dke4e5o>



Concerns for the Year Ahead

Infrastructure in 2026: Concerns, priorities and opportunities

In order to better manage risk, some IT decision makers are responding by spreading IT infrastructure across multiple locations with **a third (33%) planning to move more workloads into on-premises or colocation environments** as part of their resilience strategy over the next 12 months. The implication is strategic. Resilience depends less on simplification and more on designing infrastructure that can absorb disruption without halting operations.

This reframing is reflected in priorities, as **95% of respondents agree that resilience requirements will play a significantly bigger role in IT strategy in the next 12 months.**

Over the next 12 months, **cybersecurity and resilience (51%) emerge as the most common focus for infrastructure investment.** This aligns with a broader transition to distribution as organisations build multi-location back-up strategies, and increase hybrid environments.

Chart 5 Organisations are Planning to Strengthen Cyber Resilience Over Next 12 Months By:

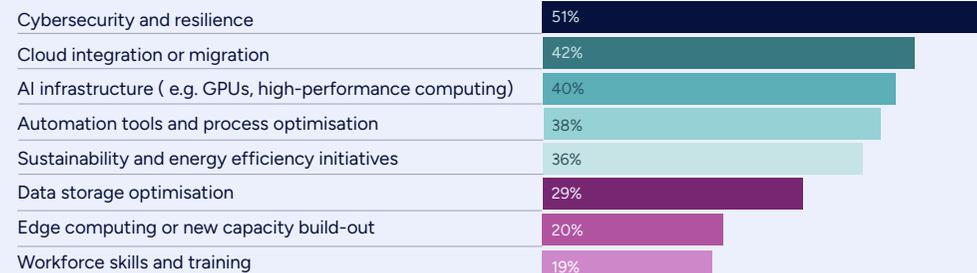
In light of recent high-profile cyberattacks and cloud-service outages, how is your organisation planning to strengthen its IT resilience over the next 12 months? [n=100]



● Total [100]

Chart 6 IT Infrastructure Investment Priorities Over the Next 12 Months

Over the next 12 months, which areas of IT infrastructure investment will your organisation prioritise? [n=100]



Concerns for the Year Ahead

Infrastructure in 2026: Concerns, priorities and opportunities

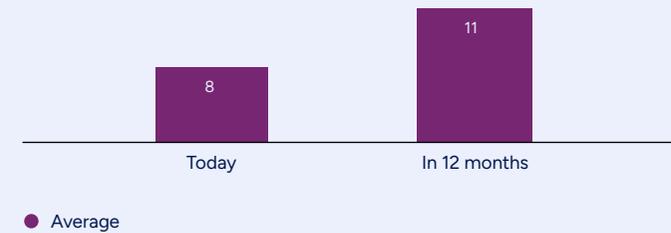
Infrastructure Beyond 2026: What is Going to Change

Beyond immediate operational pressures, IT leaders are planning for a future shaped by technology ambition, and that ambition could potentially translate into more demanding infrastructure requirements. **Over the next three years**, organisations expect to keep prioritising strategic factors such as **resilience requirements (46%), regulatory change (36%), and hybrid and multi-cloud capabilities (34%). Nearly half of respondents**

(48%) say AI adoption will be the biggest influence on infrastructure strategy over the next three years, and IT leaders are already anticipating a material uplift in power demand. They report average rack densities of 8kW per rack today, rising to 11kW within the next 12 months, an increase that intensifies both power and resilience pressures.

Chart 8 Rack Density Per Rack on Average

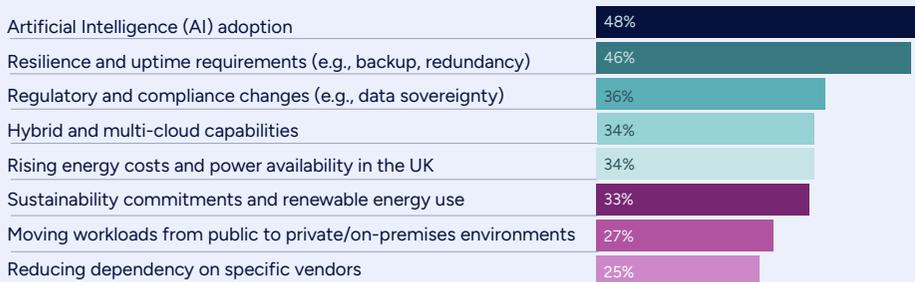
Thinking about your organisation's data centre usage, what is your typical rack density (kW per rack) today, and what do you believe it will be in 12 months' time? Showing the average KW per rack. [N=100]



This acceleration also creates an investment tension. Despite resilience remaining a stated investment priority in the next 12 months(51%), **79% of IT leaders say investment in AI is outpacing investment in resilience**, an imbalance that increases operational risk. Concern is highest among board-level IT leaders (94%), reflecting accountability for business continuity and risk exposure, compared with senior IT managers (65%), suggesting a different perspective on strategic oversight versus day-to-day operational focus.

Chart 7 Factors Influencing IT Strategy Over the Next Three Years

When considering your organisation's IT infrastructure strategy for the next three years, which of the following factors will you take into account, if any? [n=100]



Concerns for the Year Ahead

Infrastructure in 2026: Concerns, priorities and opportunities

Use of External Expertise

External professional services are a core part of IT delivery and assurance. **More than half of organisations (54%) already rely on third parties for cybersecurity services, while around a third bring in external expertise to audit and assess existing infrastructure (35%), plan for disaster recovery and business continuity (33%), and deliver end-to-end solution deployment (35%).** These core activities determine whether infrastructure is resilient and fit for purpose.

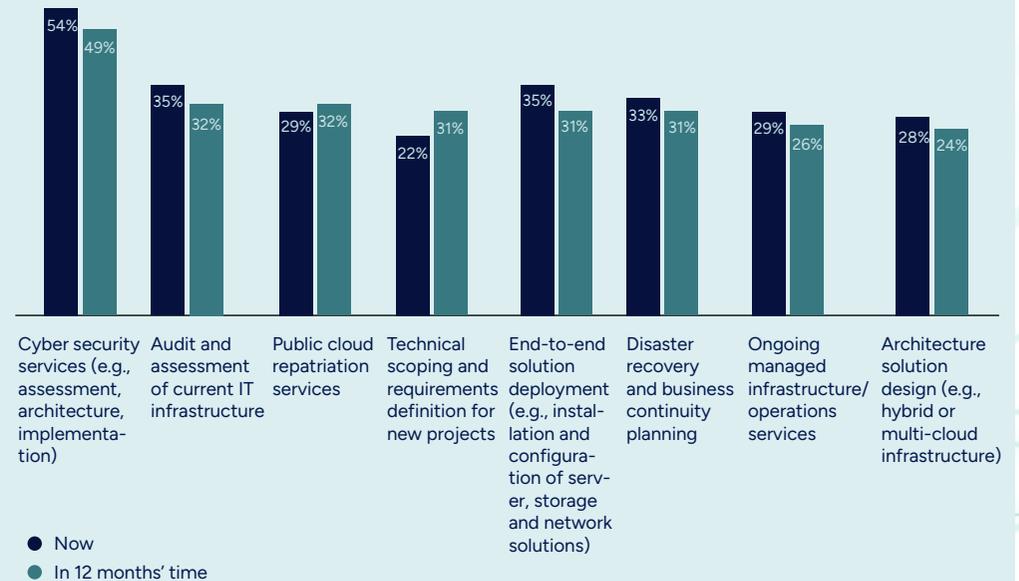
Looking ahead for the next 12 months, reliance remains broadly steady across many of the same areas. **However, demand is rising for support with public cloud repatriation (32%) and technical scoping for new projects (31%), showing signs that organisations are looking more to hybrid environments.**

This also indicates that many are focused on right-sizing infrastructure, aligning capacity to real workload demand to avoid overprovisioning while protecting performance and continuity.

This reflects a practical reality: modern infrastructure rarely sits in one place or on one platform. The skills required span security, resilience, compliance, and deployment across multiple technologies, and many organisations cannot resource all of that internally. In this context, specialist support is less about outsourcing responsibility and more about managing risk and maintaining momentum as infrastructure requirements evolve.

Chart 9 External Professional Services Used By Organisations

In which of the following areas does your organisation currently use external professional services, and in which do you expect to use them in 12 months' time, if at all? Today and 12 months' time [N=100]



Concerns for the Year Ahead

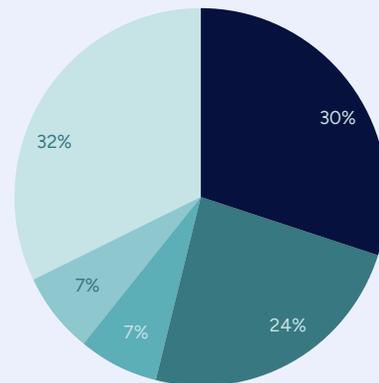
Infrastructure in 2026: Concerns, priorities and opportunities

“The UK is getting expensive every year and that means we have to shift our priorities to cut costs and maintain a level of profit”.

Senior Manager, IT,
£100.1 million - £250 million.

Approaches to Location of Data Centre

Which of the following best describes your organisation's approach to using data centres outside the UK? [n=100]



- Currently use data centres based outside the UK
- We are planning to use data centres outside the UK
- Explored the option but decided against it
- Have not explored using data centres outside the UK
- Only use data centres in the UK

Location, Sovereignty and The Push-Pull of Infrastructure Decisions

The UK data centre story is no longer one of gradual migration, it's one of divergence. While 30% of organisations already use data centres outside of the UK, and a further 24% expect to do so in the next 12 months, while nearly a third (32%) still report that they only use UK-based data centres. Rather than converging on a single 'best' approach, organisations are splitting between two competing imperatives: optimising for cost on the one hand, and protecting control and sovereignty on the other. While cybersecurity and data sovereignty are high on the agenda, they do not always outweigh cost pressures when trade-offs are made.

This polarisation reflects a push-pull dynamic at the heart of infrastructure decision-making. High power costs in the UK are a serious concern, drawing organisations toward overseas options where energy may be cheaper and power availability is perceived to be less constrained. Yet for many, the

case for offshoring is tempered by regulatory exposure, sovereignty requirements, and broader risk management priorities, factors that keep significant workloads anchored within the UK.

“My company needs a data center in the UK for stable performance and meets high security standards”.

Senior Manager, Financial Services,
£500 million - £1 billion.



Concerns for the Year Ahead

Infrastructure in 2026: Concerns,
priorities and opportunities

“Keeping all services within the UK helps us meet customer expectations around privacy, trust, and transparency, while reducing the complexity associated with managing international data transfers”.

Board Member, Managed Service Provider, £5.1 billion - £10 billion.

The result is not a wholesale pivot abroad, but a more selective approach to workload placement. Organisations appear to be making sharper distinctions between what can be moved for efficiency reasons and what must remain closer to home for governance and assurance. In this context, security remains the primary anchor: data protection obligations, sovereignty expectations and risk exposure frequently constrain how far businesses are willing or able to move workloads purely for cost or power availability. This may be behind **one-third (33%) of respondents actively planning to move more workloads to on-premises or colocation environments over the next 12 months.**

As geopolitical environments transform and tariffs shift, cross-border data transfer will come under greater scrutiny as organisations find the economics and compliance profile of hosting models changing with little warning. Amid this volatility, it's understandable why many are factoring workload moves into their near-term strategies as a pragmatic hedge against sudden risk to their data.

But as strategies evolve, one constraint is becoming unavoidable – power. It's where cost, availability, and sustainability collide, and it's increasingly the most influential factor in IT infrastructure.

“We are HQ in the UK, require physical access to DC by our staff within 1hr travel, we have compliance and data sovereignty reasons to keep our data in the UK”.

Senior Manager, Public Sector, £500 million - £1 billion.



Concerns for the Year Ahead

Infrastructure in 2026: Concerns, priorities and opportunities

ESG and the Price of Power

Senior IT professionals are caught between competing demands: securing enough power to meet rising rack-density requirements while keeping energy costs under control and meeting ESG expectations. As a result, infrastructure decisions are increasingly judged through an energy lens: can capacity be guaranteed, and can it be delivered cost-effectively?

The data reflects this tension. **Rising power costs are the leading concern today (52%), while a third (33%) still cite meeting sustainability and environmental commitments as a concern with their current data centre(s).** In other words, ESG has not disappeared, but in a high-cost energy market it is increasingly weighed against immediate affordability and access to power.

Consumer perceptions add another layer of pressure. Nearly one in two consumers (49%) believe data centres are among the biggest users of electricity in the UK, reinforcing

scrutiny on energy use even as cost and availability push to the top of the decision agenda.

Over the next three years, energy costs (34%) and sustainability commitments (33%) hold near-equal weight in how IT leaders plan their IT infrastructure strategy. Again, this could signal that while sustainability has not been deprioritised, it is now competing directly with other non-negotiables such as AI, resilience and uptime.

Chart 10 Biggest Concerns Over Data Centres Where IT Infrastructure is Currently Hosted

What are your organisation's biggest concerns regarding the data centre(s) where your IT infrastructure is currently hosted? Showing 'rising power costs' and 'meeting sustainability and environmental commitments' only [n=100]

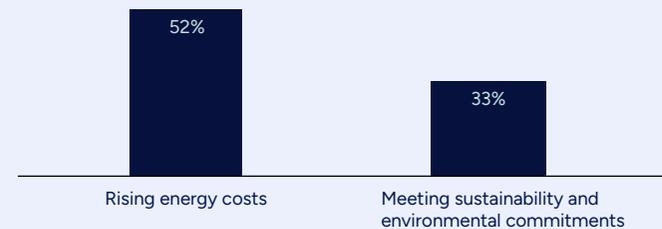


Chart 11 Factors Considered in Infrastructure Strategy Over Next Three Years

When considering your organisation's IT infrastructure strategy for the next three years, which of the following factors will you take into account, if any? Not showing all answer options [n=100]



Conclusion

Data centres are critical national infrastructure for a reason. The availability of digital services, and economic productivity depend on them working all of the time.

Data centres have moved from being 'behind the scenes' to frontline critical national infrastructure (CNI). However, the public conversation around them is still catching up, as consumers' perceptions of them is carved from a partial understanding of data centres' crucial role, while IT leaders view them as a prerequisite to UK technological progress. Closing the gap will require more proactive public education on data centres and linking them to everyday services and resilience.

The need to reframe the public narrative became more urgent after the disruptions of 2025. The lesson for 2026 is cyber security risk is a constant concern, infrastructure decisions are now judged on limiting damage and maintaining uptime. Senior IT decision makers are under pressure to show that critical workloads can withstand disruption, recover quickly, and remain protected as digital dependence deepens. It's why resilience and cybersecurity are shaping where workloads sit and how hosting strategies evolve over the next three years.

Notably, infrastructure strategy is becoming more intentional, with data sovereignty and cloud repatriation on the agenda as organisations seek hosting hybrid environments that can guarantee affordable, reliable power while meeting data protection requirements. And as rack densities rise and AI-heavy workloads drive demand, power moves from a supporting factor to a hard requirement for what organisations can deliver and where they can run critical workloads.

The implication goes beyond any one organisation. Data centres are critical national infrastructure for a reason. The availability of digital services, and economic productivity depend on them working all of the time. That is why the UK public needs a more informed conversation focused on resilience and investment, not just optics, because underinvestment does not stay contained to the sector; it shows up as outages, higher costs, and greater exposure to disruption.



About Asanti

Asanti operates six UK-wide data centres, strategically located based on optimal network coverage and power availability. The data centres are located in strategically paired sites, making them well-suited for both live business operations and disaster recovery for critical IT infrastructure. **Each site is backed by a 99.99% uptime SLA and powered by 100% certified green energy.**

A strong focus on innovation ensures that these secure data centres are optimised for performance and ready

to host solutions across a wide range of sectors - whether the need is for traditional IT infrastructure or hybrid cloud solutions. Flexibility is central to the service offering. Fixed fee and PAYG commercial models are available for power, enabling businesses to reduce OPEX and gain more predictable costs. Asanti is purpose-built to deliver leading-edge data centre solutions to the businesses of today - and tomorrow.

Asanti is a colocation data centre provider, created by a team who have a wealth of industry experience designing, deploying and managing data centres.

Methodology

In December 2025, Asanti commissioned Vanson Bourne to survey 100 senior IT decision makers in public and private companies in the UK on topics relating to IT infrastructure strategy, with a specific focus on hosting environment decisions such as resilience considerations, geographic location, and evolving rack-density demands.

In parallel, Censuswide surveyed 2,000 nationally representative UK consumers to capture public attitudes towards data centres and related infrastructure issues. Fieldwork was conducted in late January and February 2026.

Vanson Bourne is an independent specialist in market research for the technology sector. Their reputation for robust and credible research-based analysis is founded upon rigorous research principles and their ability to seek the opinions of senior decision makers across technical and business functions, in all business sectors and all major markets.

For more information, visit www.vansonbourne.com and www.censuswide.com



Glossary

A glossary of terms used in this report:

Backup generation: On-site power generation (usually diesel or gas generators) that automatically supplies electricity if grid power is lost.

Cloud repatriation: The process of moving workloads from public cloud environments back to on-premises or colocation infrastructure, often for cost, performance, control, or resilience reasons.

Critical National Infrastructure (CNI): Systems and assets essential to the functioning of the UK economy and society, where disruption would have severe national consequences (e.g. data centres, energy, transport).

Data sovereignty: The requirement for data to be stored and processed within a specific country or jurisdiction to comply with legal, regulatory, or governance obligations.

Dual power feeds: Two independent electricity supply routes into a data centre, designed to ensure continuity if one feed fails. colocation, private cloud, and public cloud.

Latency: The delay between a user request and system response; often affected by the physical distance between users and data centres.

Operational resilience: An organisation's ability to continue delivering critical services during disruption and recover quickly when incidents occur, including cyberattacks, outages, or supply chain failures.

Power availability: The ability to secure sufficient, reliable electrical power to operate IT infrastructure continuously, including during periods of grid stress or disruption.

Rack density: The amount of power consumed by equipment in a single server rack, measured in kilowatts (kW); higher densities typically reflect more compute-intensive workloads such as AI.

Uptime: The measure of how consistently systems and services remain available without interruption, typically expressed as a percentage.

